

### Understanding the "Contact or Case Patient" Field

The **Contact or Case Patient** field locks the first time a profile is saved, and it documents whether someone <u>entered</u> the system as contact or a case patient. This will always remain locked on either "Contact" (even for contacts who test positive during their monitoring period) or "Case Patient" (for cases who are entered manually into CCTO or who flow in from NC COVID). **All of this is correct, and no further action on this field is required.** If you are required to continue monitoring on a contact who tests positive, you will close out the "Contact" profile and use a new "Case Patient" profile to record their isolation monitoring. **Read on for details.** 



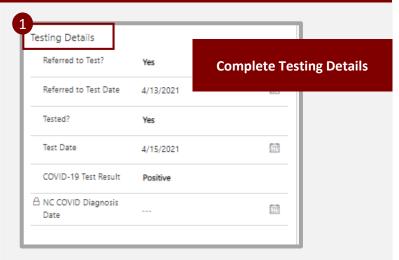
#### **Documenting Monitored Contacts Who Test Positive**

When an existing contact tests positive for COVID-19, complete the following actions:

- Complete all fields under the contact profile *Testing Details* section.
- Defer to your local guidance on any other actions required before closing this profile. When you close this profile, select the FMO of "Contact Tested Positive During Monitoring." Close and deactivate this profile per the job aid.

If your local guidance requires that this person continue monitoring after their profile has been closed and deactivated, they should continue to be monitored within a new profile labeled as a case patient. See the following pages for guidance on:

- Option 1: Continuing monitoring via a new case profile that flows from NC COVID.
- Option 2: Continuing monitoring on a cloned profile that is labeled as a case patient (if an NC COVID profile is not available).



(NC COVID Diagnosis Date is a field that is used on profiles of individuals who enter the system as cases, and you do not need to touch this field.)

2			Positive During Monitoring"	
Final Monitoring Outcome	+	Contact Tested Positive During	Monitoring	

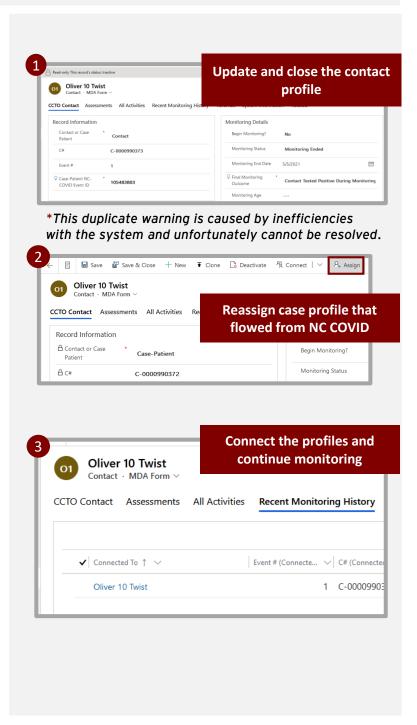


### Option 1: Continue Monitoring Through a Flowed Profile

- Most cases entered into NC COVID will flow automatically into CCTO to be sent automatic digital
  notification (see job aid), including case patients who were already being monitored as contacts in
  CCTO per the last section. Currently, there is no state-level requirement to review, monitor, or
  close out these cases in CCTO. There is also no requirement to enter cases manually.
- If your local protocol requires monitoring within CCTO on a contact who tests positive and becomes a case, you should do this on a new profile labeled "Case Patient." Ideally, this will be the profile that has flowed from NC COVID. See the process below.

If an individual who is currently being monitored in CCTO has tested positive for COVID-19, they will be entered into NC COVID as a case patient. This NC COVID record will then flow into CCTO and be notified automatically if key requirements are met. This creates a new CCTO profile labeled as a case patient on which you can continue monitoring if required:

- 1. When an NC COVID case patient record arrives in CCTO under this individual's name, there may be a duplicate warning\* on the individual's existing contact profile. Ensure this contact profile is updated and closed as "Contact Tested Positive During Monitoring" per the previous section.
- 2. Locate the individual's new case profile that has flowed from NC COVID and assign it to yourself. (You may wish to search the "All Cases Imported from NC COVID" view. If the profile is not yet available, check again in 12-24 hours or see Option 2 on the next page.)
- 3. Connect this profile to the individual's closed contact profile, transfer over any missing information, and continue monitoring on the case profile as normal. See the Connecting Contacts and Cloning, Connecting, and Deduplicating job aids for more information.



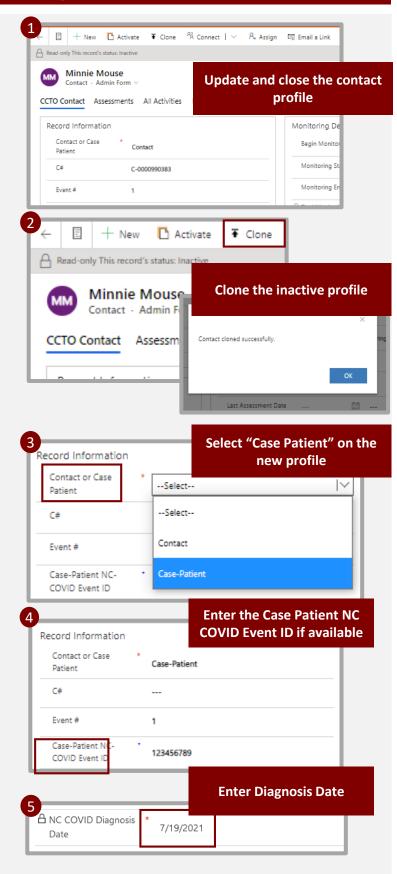


### Option 2: Continue Monitoring on a Cloned Profile

If directed by your local protocol, you can also continue monitoring a contact who has tested positive by cloning their deactivated contact profile and labeling the resulting new profile as a case.

This method does not require the use of an NC COVID profile and may be done to ensure that documented outreach to the case is not delayed.

- Ensure the profile of the contact who has tested positive has been updated and closed as "Contact Tested Positive During Monitoring" per the previous section.
- 2. Clone this profile per the guidance in the <u>Multiple Exposures</u> and <u>Cloning</u>, Connecting, and Deduplicating job aids.
- 3. In the new profile, toggle the "Contact or Case Patient" field in the **Record Information** section to "Case-Patient." Be sure to select the correct value as this field will lock upon saving and cannot be changed.
- 4. If it is available, enter the Event ID of the case in the "Case-Patient NC COVID Event ID" field. This field only displays the Event ID of the individual to whom this profile belongs, not of the source patient. (In situations when a contact is being entered instead of a case patient, this is left blank.)
- 5. Within NC COVID Diagnosis Date, enter the case's diagnosis date (date of the case's positive lab), which should be confirmed in NC COVID if available. This will lock immediately upon entry.





### Only if required: Manual Case Patient Entry

Manual entry and monitoring of cases into CCTO is not required; however, if it is recommended by your local guidance, you may enter a new case patient who is not a current contact into CCTO:

- 1. Follow the guidance outlined in the Entering a Contract micro-training to complete as much information as possible. You should not need to fill in the "NC COVID Source Patient Event ID" or "Last Date of Exposure" fields.
- 2. Toggle the "Contact or Case Patient" field in the **Record Information** section to "Case-Patient." Be sure to select the correct value as this field will lock upon saving, and cannot be amended.
- 3. In the same section, enter the Event ID of the case in the "Case-Patient NC COVID Event ID" field. This field only displays the Event ID of the individual to whom this profile belongs, not of the source patient. (If a contact is being entered instead of a case patient, this is left blank.)
- Enter the case's Date of Birth. This is a required field for all case patients and helps them utilize the portal for notified cases.
- 5. Finally, within NC COVID Diagnosis Date, enter the case's diagnosis date (date of the case's positive lab), which should be confirmed in NC COVID if available. This will lock immediately upon entry.

